



# Web-Based Transactions User's Guide

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**Use this guide for:**

**837 Claims Submission**

**835 Remittance Advice Retrieval**

**997 Acknowledgment Retrieval**

**Supplemental Electronic Remittance Advice Retrieval**

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### 1. Overview

This guide provides MassHealth trading partners with the information they need to perform certain transactions electronically with MassHealth. It includes step-by-step instructions for managing account information and exchanging electronic transactions with MassHealth.

MassHealth offers two ways to connect to the transactions Web site: by logging in and selecting electronic files for upload and download and by allowing trading partners to build software interfaces to transfer files between their computer billing system and the MassHealth transactions Web site.

This guide focuses on logging in and selecting electronic files for upload and download. For information about building software interfaces, call MassHealth Customer Services at 1-800-841-2900, send an e-mail to [providersupport@mahealth.net](mailto:providersupport@mahealth.net), or go to [www.mass.gov/masshealth](http://www.mass.gov/masshealth).

### 2. Getting Started

To exchange electronic payment transactions with MassHealth, you must meet the following prerequisites.

1. You must be an enrolled MassHealth provider or billing intermediary acting on behalf of MassHealth providers. For instructions about enrolling as a MassHealth provider or billing intermediary, go to [www.mass.gov/masshealth](http://www.mass.gov/masshealth) or call MassHealth Customer Services at 1-800-841-2900.
2. You must be an authorized electronic trading partner. The Trading Partner Agreement form can be downloaded at [www.mass.gov/Eeohhs2/docs/masshealth/privacy/hipaa\\_trading\\_partner.pdf](http://www.mass.gov/Eeohhs2/docs/masshealth/privacy/hipaa_trading_partner.pdf).
3. You must provide an Internet connection on the desktop computers of individuals who will be uploading or downloading files on the transactions Web site. If you cannot access the mass.gov Web site, contact your technical support staff or call MassHealth Customer Services for more information.
4. After authorizing your organization as a new trading partner, MassHealth Customer Services will provide a login user ID and password and will guide you through a testing process for submitting HIPAA-compliant 837 claims files for the first time. See the MassHealth Companion Guides for requirements for testing. Initially, you will be given access to a test Web site. After testing is completed, you will be given access to the production Web site where claims are processed.

**Note:** Trading partners who previously completed compliance testing for 837 uploads using the MassHealth Bulletin Board System (BBS) must also complete a test process to ensure that they are able to log in and to upload and download files.

### 3. Logging In

Information exchanged with trading partners is subject to the security and privacy restrictions defined in the Trading Partner Agreement (TPA). Use of the MassHealth Transactions Web site for the exchange of data is also subject to the terms of the TPA.

User IDs and passwords are intended for use by authorized individuals. If multiple individuals within an organization require access to the MassHealth Transactions Web site, please contact MassHealth Customer Services at 1-800-441-0323 to arrange for their access.

Follow these steps to get to the MassHealth Transactions Web site:

1. Go to the MassHealth home page at [www.mass.gov/masshealth](http://www.mass.gov/masshealth). To access provider-specific information and services, click on the Providers tab at the top of the screen. See Figure 1.

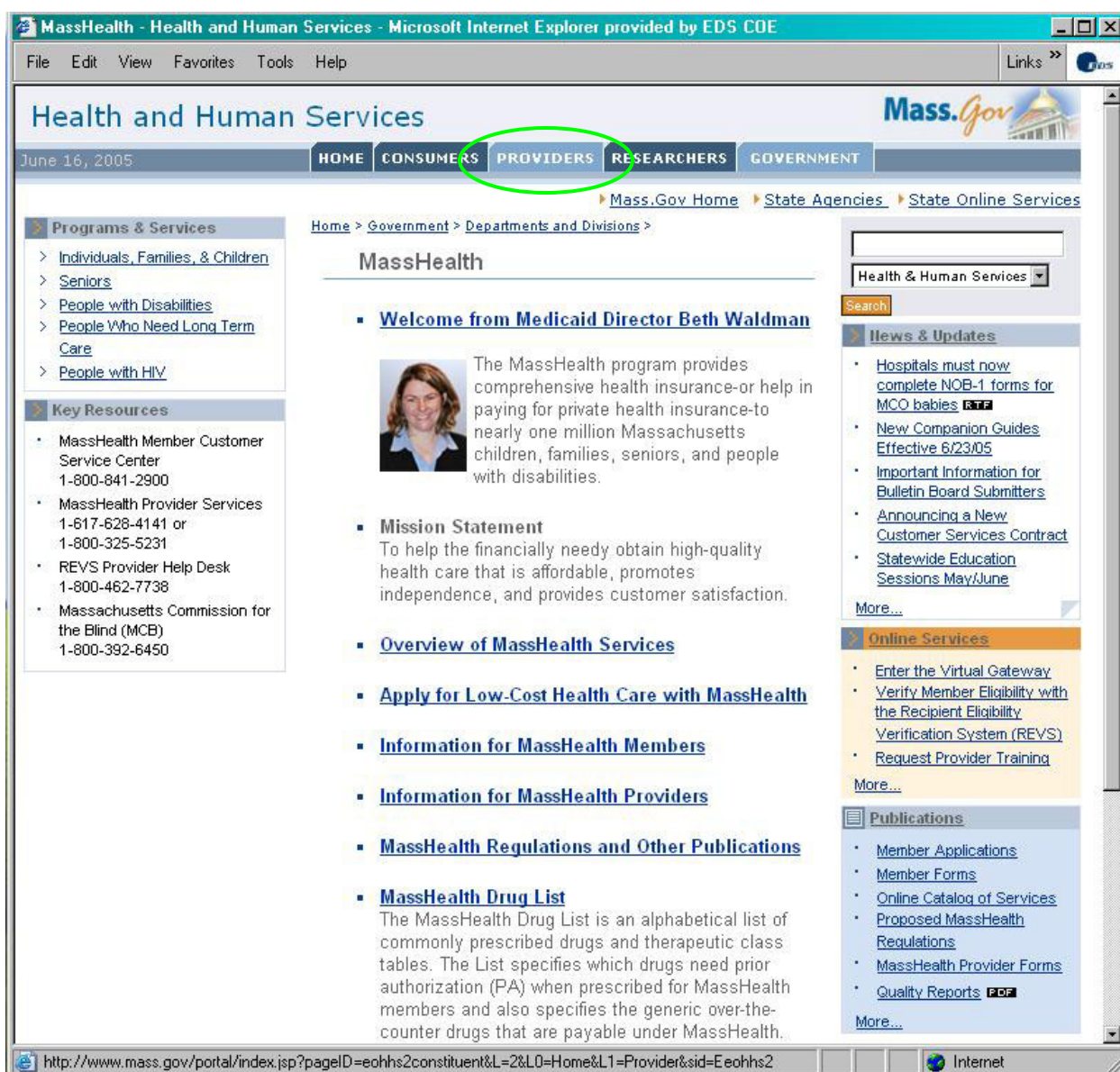


Figure 1. MassHealth home page. Click on the Providers tab.

- From the resulting screen, click on “MassHealth Claims” (see Figure 2). This link appears under the “Invoice and Claims Submission” section.

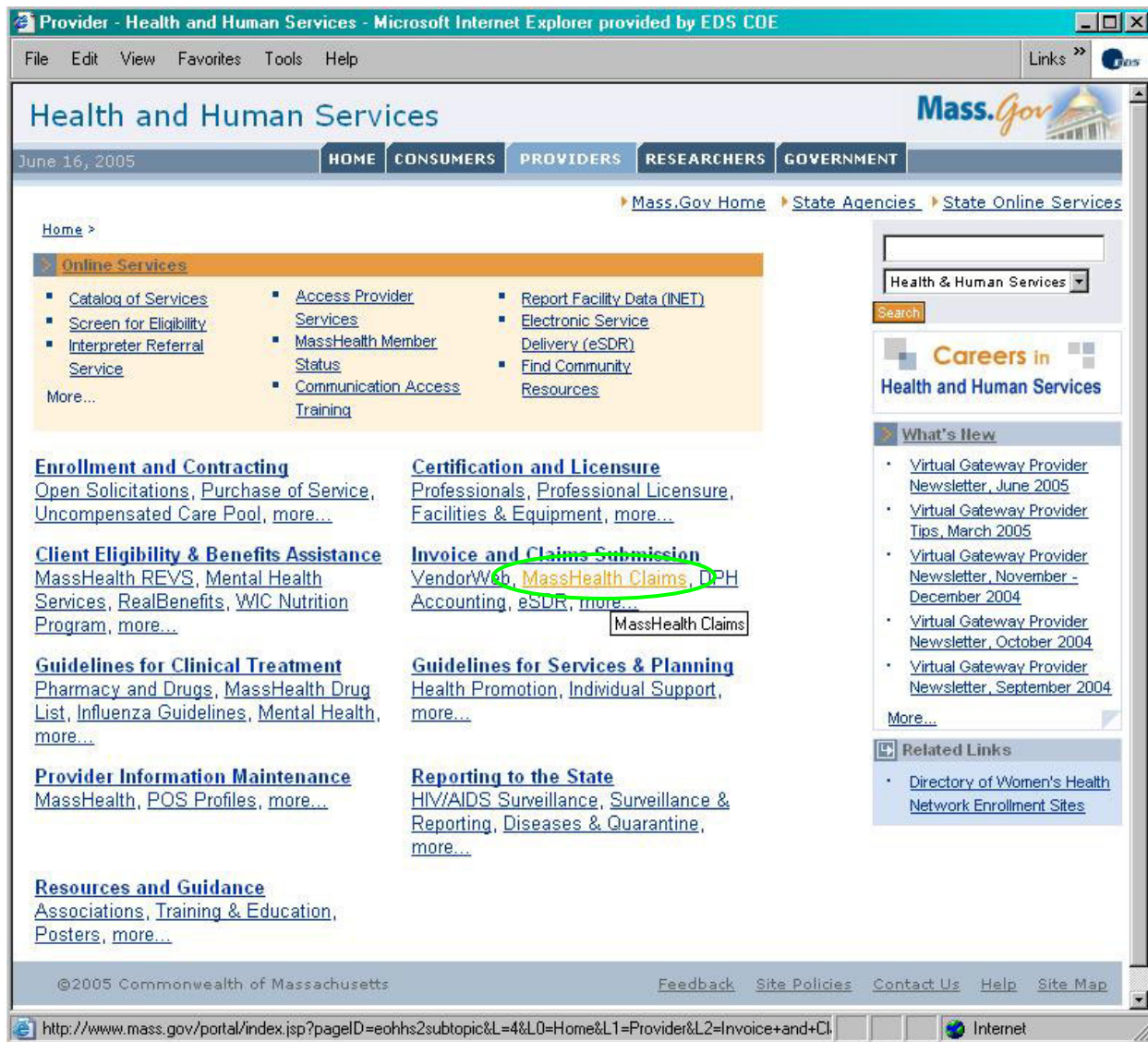


Figure 2. MassHealth Claims link.

- In the resulting page, click on “Web-Based MassHealth Transactions” as shown in Figure 3.



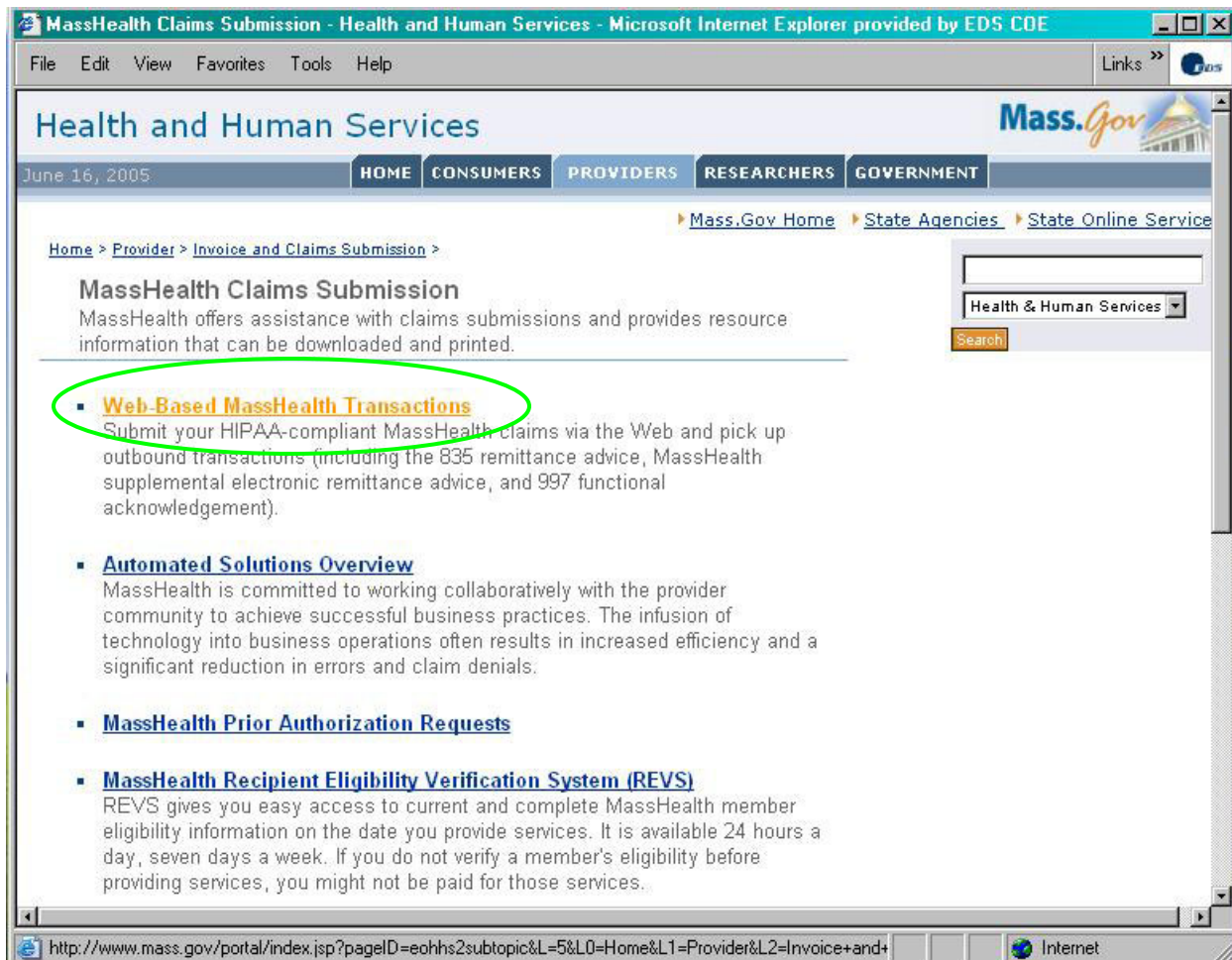


Figure 3. Web-Based MassHealth Transactions link.

4. In the resulting page, shown in Figure 4, there are two links: one for test transactions, and one for production transactions.
  - New trading partners and existing Web submitters testing submission of new transaction types must click on “Test Transactions” for testing purposes. Claims submitted on this site will not be paid.
  - Current submitters must click on “Production Transactions” to submit claims for processing and download associated files.

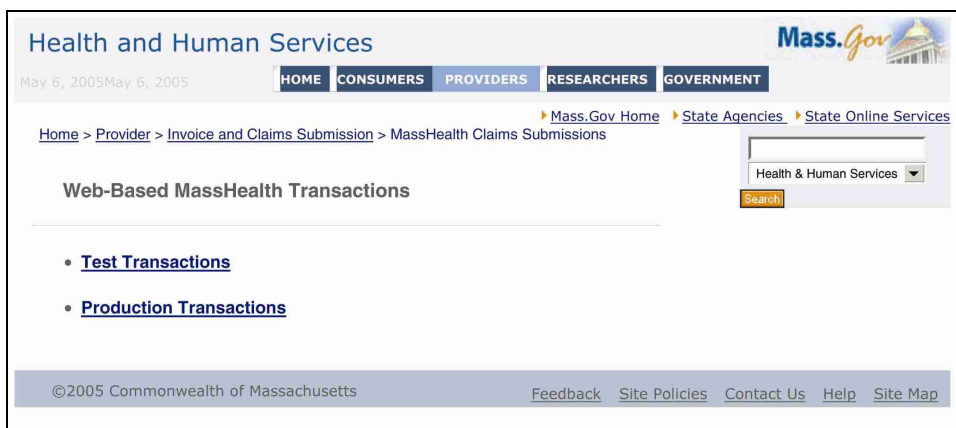


Figure 4. Web-Based MassHealth Transactions screen.

The remainder of this guide does not distinguish between the test and production Web sites, since their features are the same. **Only MassHealth claims submitted on the production Web sites will be processed for payment.** The test Web site is clearly labeled “Test” on the Login, Welcome, and Upload screens. See Figure 5 as an example of how the test Web sites are clearly marked.

The login box circled in Figure 5 provides access to the transactions portion of mass.gov. Type your submitter ID and password in their respective fields, then click the Submit button. If you do not remember your password, click “Forgot Password” to reset it. See the Troubleshooting section for more details on the Forgot Password feature.

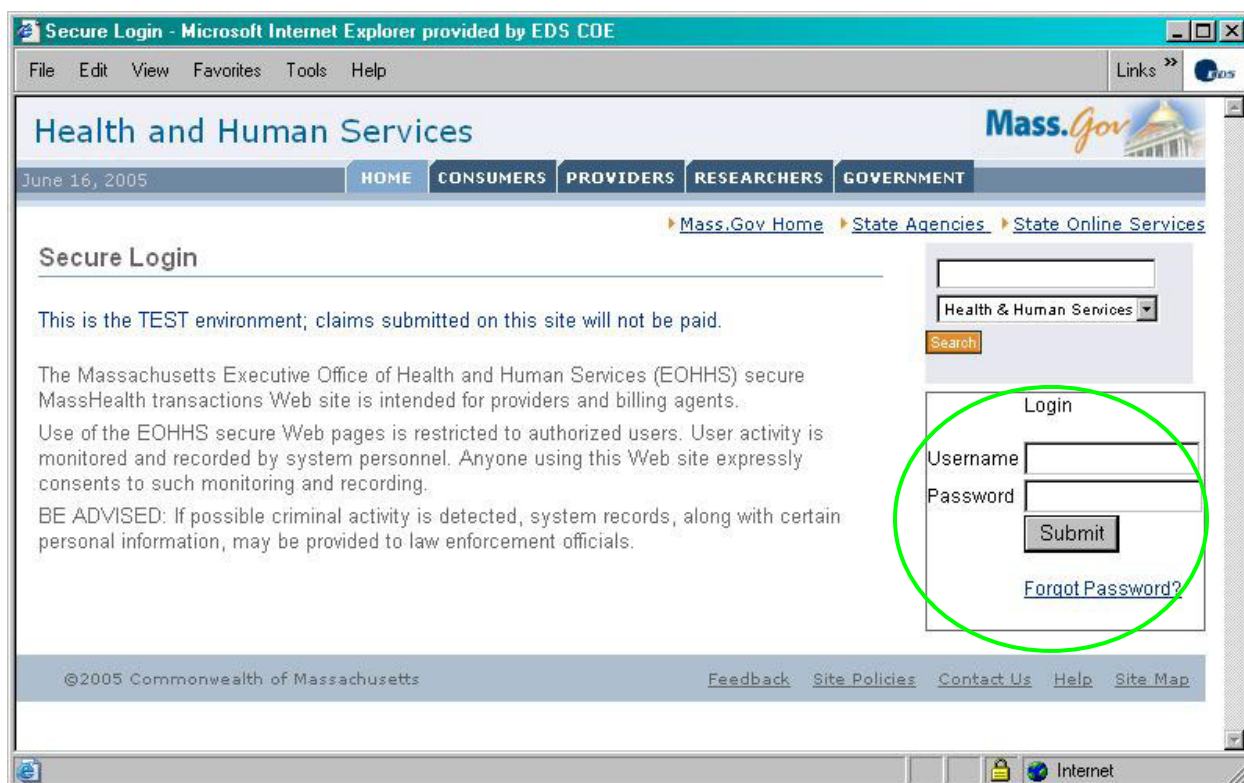


Figure 5. Secure Login page.

The first time that you log in to the transactions Web site, you will be prompted to change your initial password that was assigned by MassHealth Customer Services. The Password Reset screen is shown in Figure 6. You will also be prompted to change your password after login, if you have not reset your password within the previous 90 days.

Passwords must follow these guidelines:

The password must contain at least **two** of the following four types of characters:

- uppercase letter (for example, A, B, or C)
- lowercase letters (for example, a, b, or c)
- numbers (for example, 0, 1, 2, or 3)
- special characters (for example, !, @, #, \$, or %)

The password must be a minimum of eight characters long.

Figure 6. Password Reset screen

After your user ID and password are verified, the “Welcome” page (see Figure 7) appears. You can select the desired transactions by using the menu on the Welcome page and on the lower right side of subsequent pages. You can navigate to the other portions of the EOHHS Web portal by using the tabs on the top of each page, using the search window on the upper right side, or using the links at the bottom of each page.



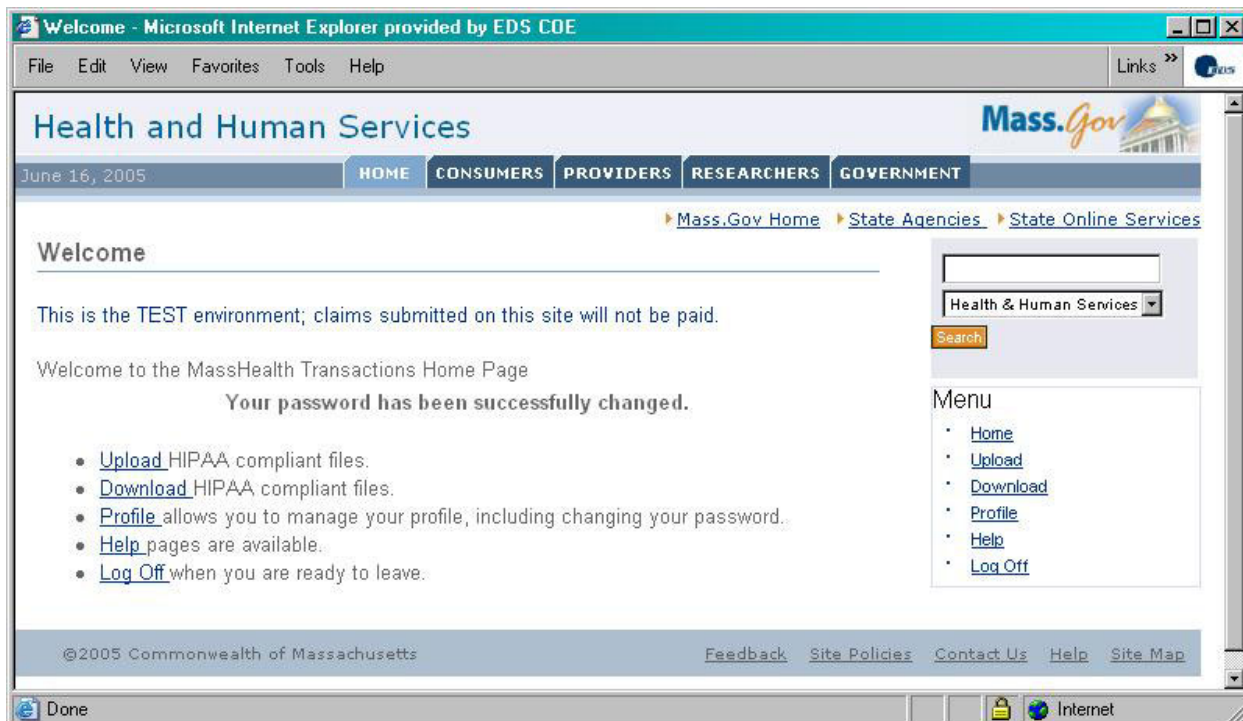


Figure 7. Welcome page

## 4. Maintaining User Information

### 4.1 User Profile

The transactions system includes submitter profile information that you can update as needed. By clicking on "Profile" in the menu after logging in, you will see the Profile page. See Figure 8.

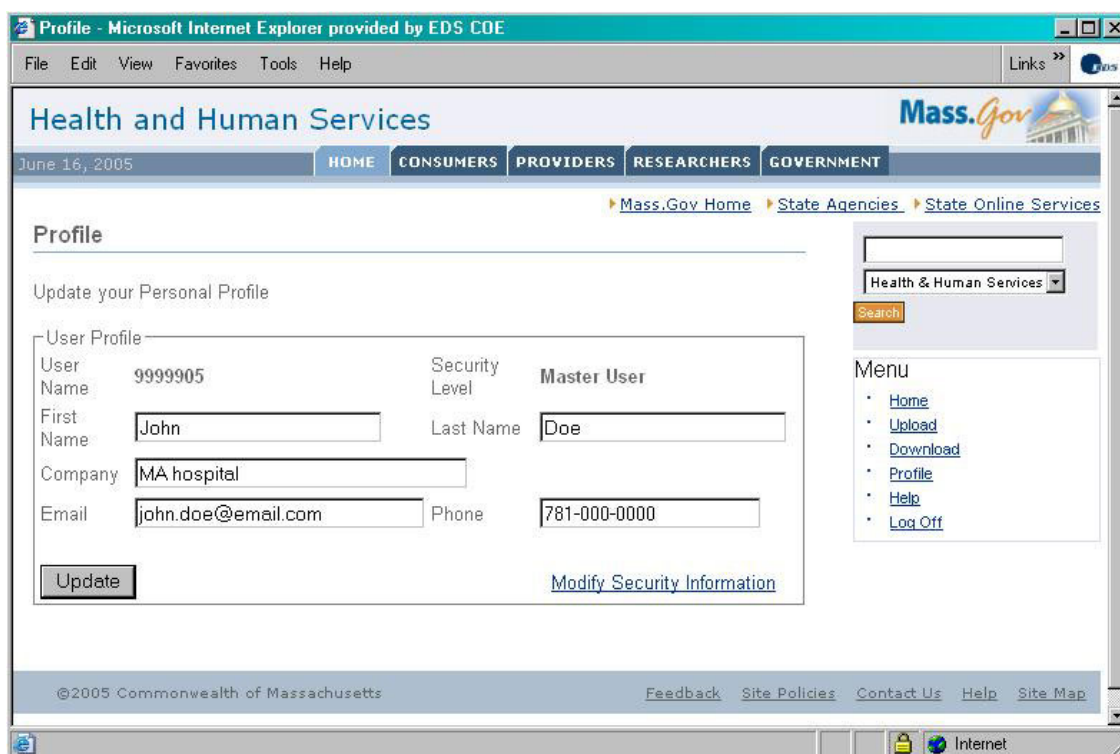


Figure 8. Profile page

The submitter ID and security level are displayed, but cannot be changed. A security level of “Master User” indicates that the user is the primary login ID. If more than one user exists for a given organization, different security levels may be displayed.

If you need to notify MassHealth of a change or correction to your submitter contact information, you can change the following items on the main Profile page shown in Figure 8:

- First name
- Last name
- Company name
- E-mail address
- Phone number

## 4.2 Changing Password or Security Questions

The transactions Web site contains a Forgot Password feature that allows you to reset your password by answering the questions that you previously entered. When you first begin accessing the production Web site, you should follow the instructions in this section to set your security passwords.

To update your password and associated security questions, click on “Modify Security Information,” which is displayed on the Profile window in Figure 8. The resulting page is shown in Figure 9.

Figure 9. Password Reset page

Useful security questions are ones that only you can easily answer, such as the name of your elementary school.

Each user's password will expire every 90 days. You may use the Password Reset page to update your password before the 90-day deadline. After 90 days, you will be prompted to reset your password when you log in. For password rules, see page 6.

## 5. Exchanging Files

### 5.1 File Formats

Data may be exchanged in formats compliant with HIPAA transaction rules. See the MassHealth Companion Guides on [www.mass.gov/masshealth](http://www.mass.gov/masshealth) for additional information.

The MassHealth transactions Web site is used to upload HIPAA 837 claims files and to view and download the following files: HIPAA 997, 835, 820, 834, and supplemental 835. A separate MassREVS Web site is used to access eligibility and claims status information.

### 5.2 Uploading MassHealth 837 Claims Files

To submit an electronic HIPAA 837 claims file, select "Upload" from the menu. Figure 10 shows the resulting page.

Figure 10. Upload MassHealth Claims page

You can upload up to five files at a time. The files can be compressed (Zip files) or uncompressed. **Please Note:** The combined size of all uploaded files may not exceed 16 MB. If the combined file size is too large, an error message will display. If this happens, you must attempt to upload the file(s) again, either by uploading fewer files at once, or by compressing them.

To select a file to upload, click the Browse button next to the first empty field. A window will appear to allow you to browse for a file and select it for upload. The operation of the file selection window is based on the operating system of your computer. Locate the desired file by using the window. When selecting a file, its name will appear in the text field next to the Browse button. Continue selecting files to upload as needed. Once the upload file(s) are selected, click the Upload Files button. To facilitate the checking of the transmission status, we recommend that you make note of the date and time of each upload.

The transactions Web site does not require that files be named using a specific standard; submitters may use any naming standard that is convenient. The system does not use the file name but relies instead on a unique tracking number assigned by the system.

After the files have been successfully uploaded, a confirmation tracking number will appear in the upper portion of the Upload screen as shown in Figure 11. The only reason that you will need to record this tracking number is if you need to contact MassHealth Customer Services with questions or issues about the uploaded claims file. If a tracking number is not displayed, a problem occurred with the upload and the file(s) should be uploaded again.

You will usually receive the tracking number within seconds of a successful transmission. Larger files may take longer to upload, depending on their size. If you upload multiple files, or if you send a compressed file that contains several individual files, the system will generate a single tracking number.

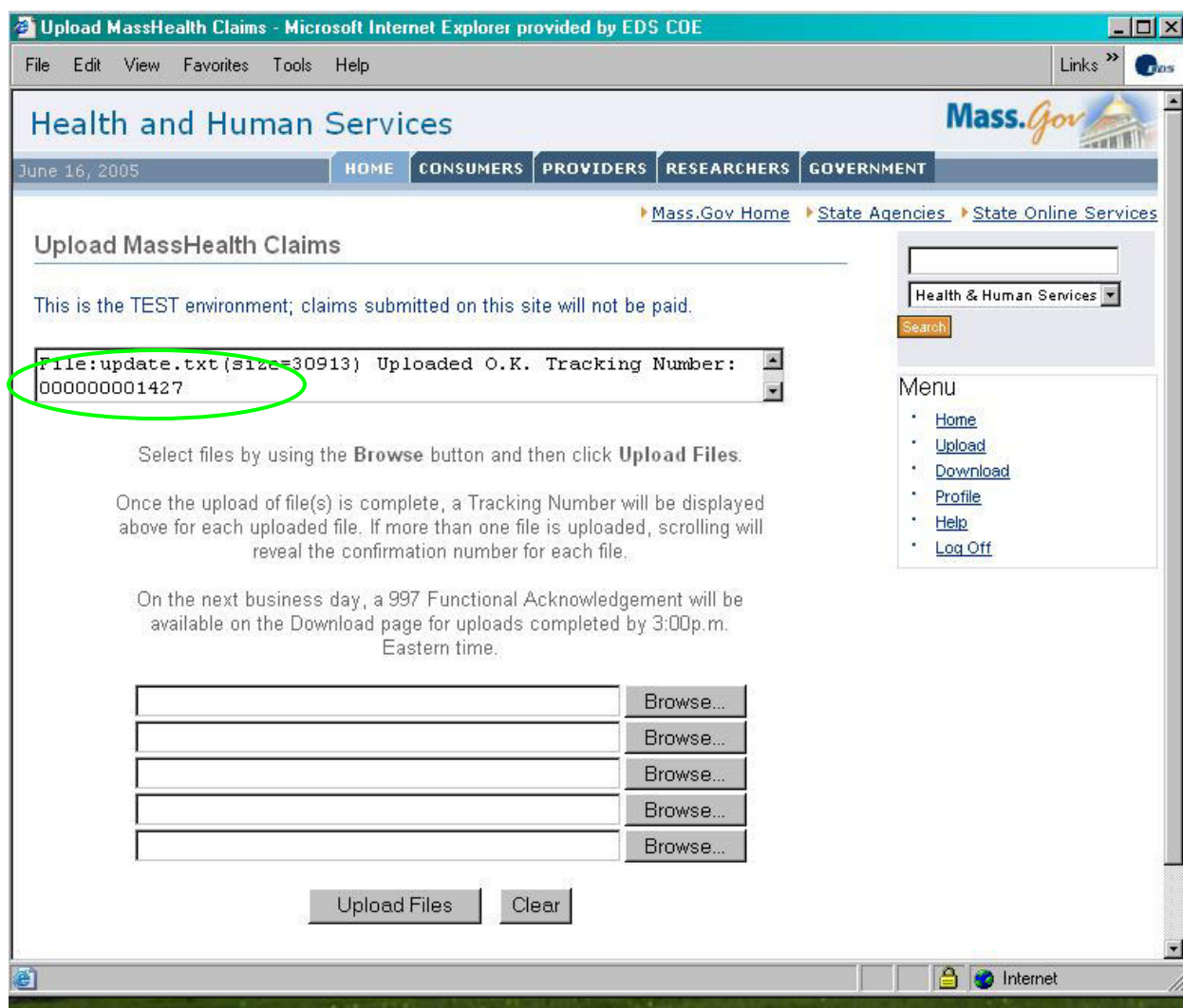


Figure 11. Tracking number

This message indicates a successful file upload, but it does not confirm that your file(s) passed HIPAA compliance. Please verify your file's HIPAA compliance status by retrieving the 997 Functional Acknowledgement Report.

### 5.3 Downloading Files

To retrieve files from the MassHealth transactions Web site, click on the "Download" option from the menu. This link will enable you to receive the various types of electronic MassHealth claims file downloads that trading partners are authorized to receive, including 997 Functional Acknowledgements, 835 Remittance Advices, and Supplemental files 820 Payroll Deducted and Other Group Premium Payment for Insurance Products, and 834 Benefit and Enrollments.

After you select the "Download" option, the Download Files page appears. (See Figure 12.) This page lists all files available to download.



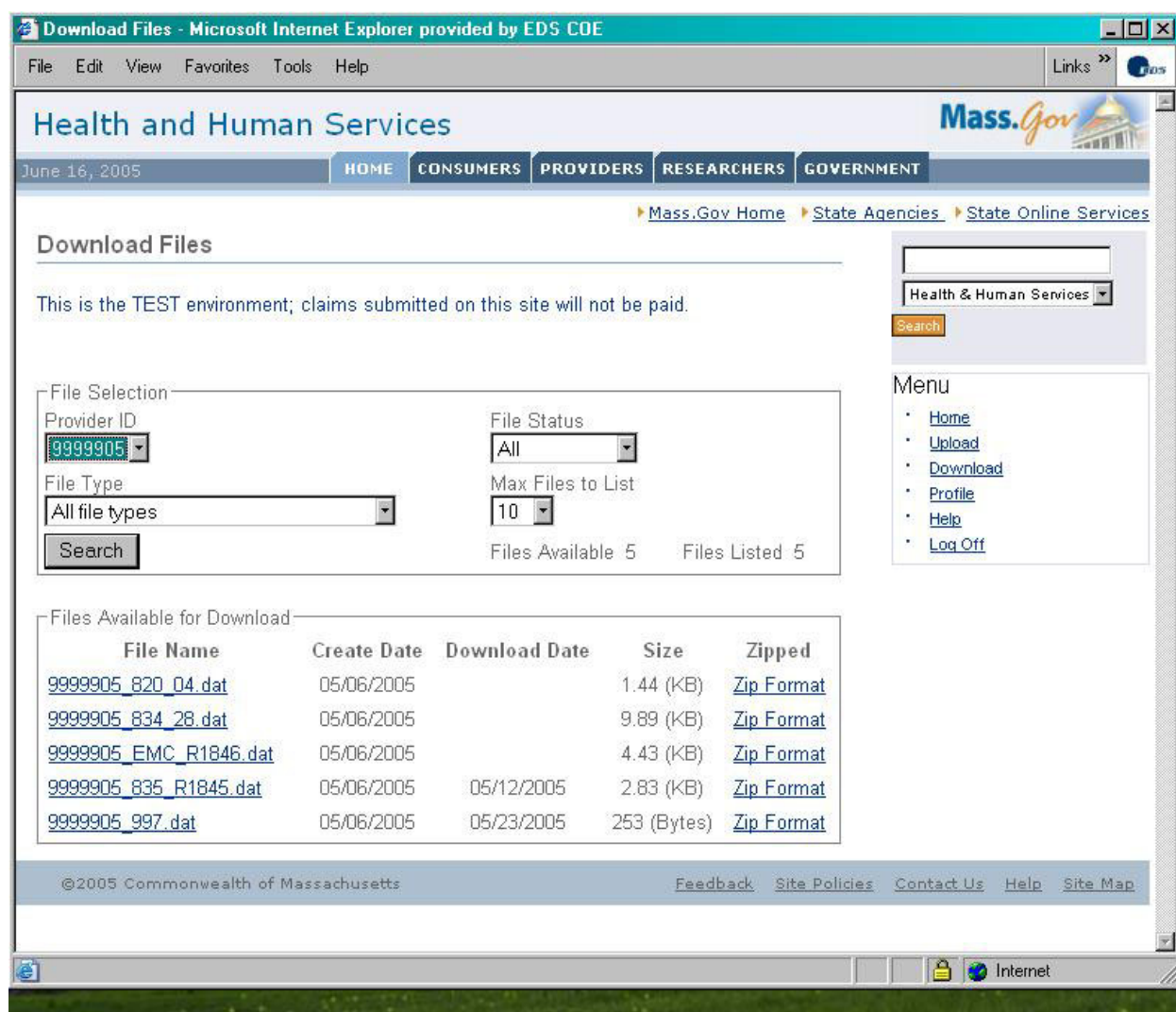


Figure 12. Download files page

You may click on the name under the File Name column to view or download an uncompressed (".dat") version of the file. Or you may click the "Zip format" link to the right of the appropriate file name to download a compressed (or Zipped) version of the file.

When the download page is first opened, the search criteria in the "File Selection" box will be defaulted to certain values. The oldest files that have not yet been downloaded will appear at the top of the list by default. If you need to refine the search options to find specific files, use the following four drop-down menus:

- "Provider ID" defaults to the ID of the user who is logged in. If you have been given access to multiple providers' files, you can specify which provider's files you want to view. Only files for one provider may be listed in each search.
- "File Type" defaults to all transaction file types. You can select a specific transaction file type (such as 997 or 835) if you want to view only those files.
- "File Status" defaults to all available files. You can select "New" to view only the files that you have not previously downloaded (that is, with no download date), or you can select "Downloaded" to view only previously downloaded files (that is, with a download date).
- "Max Files to List" lets you limit how many files will be listed for the Search. This is particularly helpful when you select Download above.

**Note:** Only the last six months of your download files are available on line. Files with 'create dates' that are older than six months are archived and will not appear on the download list. Download and save all files that you want to retain for longer than six months. If you must obtain files that are older than six months, contact MassHealth Customer Services by calling 1-800-441-0323 or sending an e-mail to [providersupport@mahealth.net](mailto:providersupport@mahealth.net) for assistance.

## 6. Troubleshooting

Please read the following tips for solving problems that may occur when using the Transactions Web pages. If none of these situations match what happened, or does not resolve your problem, contact MassHealth Customer Services by calling **1-800-841-2900** or sending an email to [providersupport@mahealth.net](mailto:providersupport@mahealth.net) for assistance.

**Problem: I am unable to access the Web site.**

**Solution:** Be sure that your system is connected to the Internet. You can test this by attempting to access other Web sites. If you believe that there is a problem with the Web site, contact MassHealth Customer Services.

**Problem: I am having problems uploading or downloading files.**

**Solution:** Large files may take a long time to upload or download, depending on the speed of your Internet connection. Allow time for the transfer to complete, taking into account the status indicators provided by your Web browser. If the status indicators do not change for several minutes, it is likely that your connection to the Internet has been lost. In this case, start the transfer again.

**Problem: I am unable to log in; I forgot my password.**

**Solution:** If you previously updated your Security Information with two security questions, you can click on "Forgot Password" on the Login page to reset your password. If you cannot reset your password after following the instructions below, or if you are having problems logging in, please contact MassHealth Customer Services.

If you attempt to enter an invalid password five times, the system will suspend your ID for security purposes. If this occurs, you must contact MassHealth Customer Services to have your password reset.

After clicking "Forgot Password," the window shown in Figure 13 appears.

Forgot Password - Microsoft Internet Explorer provided by EDS COE

File Edit View Favorites Tools Help Links »

Health and Human Services Mass.gov

June 16, 2005 HOME CONSUMERS PROVIDERS RESEARCHERS GOVERNMENT

Mass.Gov Home State Agencies State Online Services

**Forgot Password**

Please enter your user name to retrieve your security questions:  
If your questions are available and you successfully answer the questions you will be redirected to the Change Password screen.

Username

Continue

Health & Human Services

Search

Menu

- [Help](#)
- [Logon](#)

@2005 Commonwealth of Massachusetts Feedback Site Policies Contact Us Help Site Map

Internet

Figure 13. Forgot Password page

Enter your user name and click “Continue.” This action opens the window shown in Figure 14.

Forgot Password - Microsoft Internet Explorer provided by EDS COE

File Edit View Favorites Tools Help Links »

Health and Human Services Mass.gov

June 16, 2005 HOME CONSUMERS PROVIDERS RESEARCHERS GOVERNMENT

Mass.Gov Home State Agencies State Online Services

**Forgot Password**

Please enter your user name to retrieve your security questions:  
If your questions are available and you successfully answer the questions you will be redirected to the Change Password screen.

Username

Security Questions

1. What is my maiden name

2. what is my favorite color

Security Responses

Continue

Health & Human Services

Search

Menu

- [Help](#)
- [Logon](#)

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Internet

Figure 14. Forgot Password security questions

Type the answers to the security questions and click “Continue.” If you answer either question incorrectly, an error will be displayed. You may attempt to answer the questions again. If you are unable to answer the security questions a second time, contact MassHealth Customer Services for assistance. Correct responses to your security questions prompt you to reset your password as shown above in Figure 9. At that point enter your new password, confirm it, and click “Update.”

Please note that the two security questions need to be set up when you first log in to the system. See page 8 for instructions.